

Quick Reference Guide

Reimbursement Accounts

Aetna Reimbursement Accounts, administered by PayFlex®, are provided by Aetna Life Insurance Company (Aetna). Below are instructions to help you take advantage of all the online features and tools offered.

Accessing your account online

To access your account online, go to PayFlexDirect.com, or if you are an Aetna member, you can also access your account through Aetna Navigator®.

- If you are already registered at PayFlexDirect.com, enter your user name and password.
- If you are not yet registered at PayFlexDirect.com, click on Register and then follow the online prompts.

Account balances and alerts

From **My Dashboard**, you will be able to:

- View your account balance, your card status, account alerts and your next claim reimbursement status.
- See your most recent claims, payments and deposits by clicking on the **Financial Center** and selecting the account you wish to view in detail.

Link to the tools you need

On **My Dashboard**, under the **Quick Links** panel, you will find the information and tools you need the most. Such as **My Resources**, **File a Claim** and **Manage My Debit Card(s)**.

File a claim

- Click on **File a Claim** under **Quick Links**. Then, select **Pay Me** to reimburse yourself or select **Pay Them** to pay your health care or dependent care provider directly.

If you selected Pay Me:

Enter your claim information: type of expense, date of expense and the amount of expense. To add additional claims, select **Add Another Claim**.

- Once you have entered in all of your claims, click **Next**.
- Confirm all expense details, then click **Next**. To make changes, click **Previous**.

- Select **Fax** or **Upload**. (Upload requires claims to be provided in PDF format.) To “Fax,” click on **Create Cover Sheet**, then print, sign and fax the form and itemized receipts to the number shown on the cover sheet. By signing the fax cover sheet, you certify that your claim is for eligible expenses.
- To “Upload,” use the **Browse** button to select your receipts in PDF format from your computer.
- To add additional documents, click on **Add Additional Document**.
- Check the **Signature Box** at the bottom of the page to sign your claim and confirm your submission is for eligible expenses.
- Click **Submit**. If you signed up for eNotify, PayFlex will send you a confirmation e-mail once your claim has been processed.

If you selected Pay Them:

- Select your payee from the drop-down menu and click **Next**, or add a new payee by selecting the + symbol.
- If you are adding a new payee, complete all required fields, click **Save**, then click **Next**.
- Enter your contact number, statement date and invoice number (if applicable); patient name; and any comments you may have, then click **Next**.
- Fill in your claim information and click **Next**.
- Verify your claim information is correct and click **Next**.
- Select **Fax** or **Upload**. (Upload requires claims to be provided in PDF format.)
- To “Fax,” click on **Create Cover Sheet**, then print, sign and fax the form and itemized receipts to the number shown on the cover sheet. By signing the fax cover sheet you certify that your claim is for eligible expenses.
- To “Upload,” use the **Browse** button to select your receipts in PDF format from your computer.
- Click **Submit**. If you signed up for eNotify, PayFlex will send you a confirmation e-mail once your claim has been processed.



Order additional PayFlex Cards

- From [My Dashboard](#), select [Manage My Debit Card\(s\)](#) under [Quick Links](#).
- You will see the status of your card, the names whom we issued cards to and which accounts are connected to that card.
- If you would like to order an additional debit card for a dependent or spouse, select [Order a Dependent Debit Card](#).
- Enter the first and last name of your dependent or spouse.
- Select the dependent's relationship to the cardholder and click [Submit](#).
- Your card will arrive within 10-15 business days.
- If your card is lost or stolen, please contact us immediately. Visit the [Contact Us](#) page on the PayFlex website for your designated phone number.

Sign up for electronic account updates

- Staying connected is quick and easy! From [My Dashboard](#), select [My Settings](#) at the top of the page.
- Select [Change E-mail](#) and check the [eNotify](#) box.
- Enter your e-mail address and then re-enter to confirm.
- Then click [Submit](#).

For fast reimbursements, enroll in direct deposit

- From [My Dashboard](#), select [My Accounts and Services](#) on the left-hand navigation.
- Then select [Enroll in Direct Deposit](#).
- Select your employer and bank account type, add your account number and routing number and Institution Name, then click [Next](#).
- Review your account information.
- If the information is correct, click [Confirm](#). If you need to make a change, click [Previous](#).
- Once you have confirmed your account information, a confirmation message will be displayed.

Keep connected anytime, anywhere

If your employer provides, use your smartphone to access your reimbursement account virtually 24/7 with the PayFlex Mobile™ Application. You can view your benefit plan information, account balances, claims processed and transaction details. You'll receive important account updates and alerts when action may be required. You can also submit a claim "on the go" with your phone's camera. It couldn't be easier!

Questions?

You can contact Customer Service at 888-678-8242 Monday – Friday, 7 a.m. – 7 p.m. and Saturday from 9 a.m. – 2 p.m. CT.

About PayFlex

PayFlex Systems USA, Inc., one of the nation's leading account-based third party administrators, has become part of the Aetna family and provides administrative services for Aetna's Consumer Financial Solutions products. PayFlex's robust account tools make it easy for you to manage your tax-advantaged accounts. Key features include real-time account balances, customizable account alerts, a mobile application if offered by your employer and the ability to decide if, how and when to use your account.

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